

Soft Credits

Last Modified on 06/03/2025 12:35 pm EDT

What is a Soft Credit?

A **soft credit** is a way to recognize a donor for a gift they didn't *directly* give, but had influenced or facilitated. It's for tracking purposes so you can "soft credit" the influencer to help you keep track of who is helping to bring in donations to your organization.

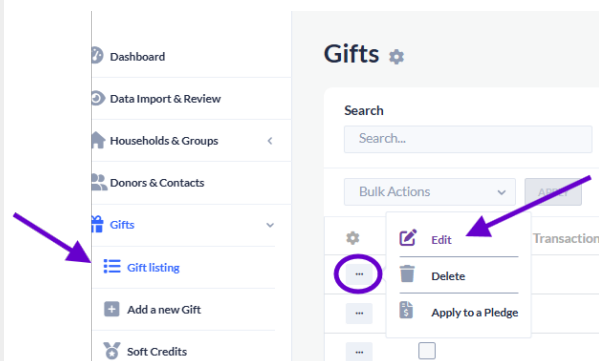
For example:

- A supporter invites a friend to an event and the friend makes a donation, the supporter would get a soft credit for making the introduction to the organization.
- The donation is a multi-donor contribution, so you'll soft credit those who contributed and hard credit the person whose name is on the check.

Donor CRM does not offer soft credit acknowledgments. Only the primary donor will be eligible to **receive a Thank You Letter**.

How to apply a Soft Credit

- Follow the steps to **add a new gift**. Or, locate an existing gift from your **Gift Listing** > Actions > Edit.



- In Step 2, select box for **Soft Credit**.

2

Gift Date * required	Gift Amount * required	<input type="checkbox"/> Make this Gift a Tribute
<input type="text" value="Jun 3, 2025"/>	<input type="text" value="\$25.00"/>	
Payment Type * required	Fair Market Value ?	<input checked="" type="checkbox"/> Soft Credit
<input type="text" value="Check"/>	<input type="text" value="\$0.00"/>	Assign a Soft Credit

- Enter the name of an existing contact, and select from the dropdown

Assign a Soft Credit

Assign Soft Credit to	Amount	
Bob Boblaw	\$0.00	+

CANCEL SAVE

- Optional: Select the + action to credit additional contacts.
 - Note: Each Soft Credit must have a unique Soft Creditee.

Assign a Soft Credit

Assign Soft Credit to	Amount	
John Doe	\$10.00	×
Bob Boblaw	\$10.00	×

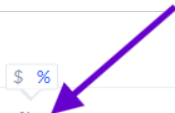
CANCEL SAVE

- Click to choose between a % amount or % value.

Assign a Soft Credit

Assign Soft Credit to	Amount	
John Doe	100.00%	+

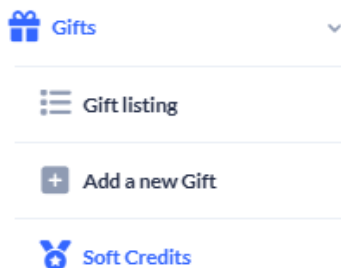
CANCEL SAVE



- Enter the amount of soft credit the contact(s) will receive > Save.

Soft Credit Reporting

A soft credit report can be viewed and exported by selecting **Gifts > Soft Credits** from the left navigation.



Apply any search filters as necessary, or select **Download Excel** to generate the report. A notification will display once the report is ready for download.



Your Soft Credits report is ready

[Download](#)



Soft Credits

[ADD NEW GIFT +](#)



[DOWNLOAD EXCEL \(UTC\)](#)

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The exported report will include the following columns:

- Parent Transaction.Id
- Parent Transaction.External System Id.1
- Credited Contact.First Name
- Credited Contact.Last Name
- Parent Transaction.Contact.First Name
- Parent Transaction.Contact.Last Name
- Parent Transaction.Gift Date (UTC)
- Credit Amount
- Parent Transaction.Original Amount
- Parent Transaction.Campaign.Name
- Parent Transaction.Source.Name
- Parent Transaction.Sub Source.Name
- Parent Transaction.General Ledger.Name